

EATF Requirements

Functionality

Weatherization Outreach -- Optional (Reference LIHEAP Contract section F7)

Is this activity an optional module/functionality to be made available?

Do we want to track outreach methodology (e.g., job faire, seminars, etc.)?

What level of detail do we want to capture/required?

Do we need to track contracted outreach (subcontractors)?

Is it important to CSD Staff to get outreach detail? Yes per Dianna.

Are you interested in tracking outreach activity (e.g., count, cost, etc.)?

Contact Management Module -- Optional

Minimum amount of data to capture:

- Date
- Name
- Phone number
- Program(s)
- Source of referral
- Email

Prescreen -- Optional

Gather:

- Name
- Mailing address
- Services address
- Phone numbers
- Income
- Household size
- Immigration Status
- Own/rent
- HUD unit
- Type of dwelling
- Age of dwelling
- Primary heating source

INTAKE

Eligibility

Do we track non-eligible clients? Yes, optional.

What level of detail?

Do we track SSN? Yes optional, CSD seeking legal opinion.

Client:

- Name (First, Initial, Last)
- Mailing address (City, State, Zip, Unit #, County)
- Service address (City, State, Zip, Unit #, County)
- Phone numbers
- Household size
- Utility costs (company, cost, account #, name on bill)
- Energy burden (system calculated)
- Income (gross)
- Demographic info (vulnerable population detail)
- Immigration Status (optional – default to NA)
- Signed application
- Other misc. info (birth certs, driver's license, photo ID, etc.)
- Previously served/eligible under other program
- Intake date (discuss all dates to be tracked – prescreen, eligibility, served, assessment, completion)

NOTE: Assessment of dwelling must occur within 120 days of intake date

Dwelling

- Type – multi (# of units), (sync with DOE categorization '06 contract year. Ref. CSD 43)
- Type of Cooling
- Heating Fuel (DOE only)
- Water Heater
- Type of Range
- Heating Type
- HUD info (a HUD building)
- Age of Dwelling
- Lead Free
- Agency Defined
- Previously weatherized unit (pending CSD definition)
- Re-weatherized (pending CSD definition)
- Property owner waiver or landlord agreement (owner's consent to work on the dwelling)
- Other agency/utility leveraging, (define utility program and measures)
(Flag for follow up)

- Gas HH w/o Combustion Appliance Safety (CAS) test (follow up, revisit language)

Prioritization—Optional (LIHEAP Contract Section F6)

Client Priority:

- Source of Income
- Energy burden
- Points

Job Scheduling Priority:

- Recertification date
- Geographical location

Dwelling Assessment

This section will be discussed at next meeting.